CALIFORNIA
STUDENT AID
COMMISSION

GETTING STARTED

WebGrants User Guide

Updated: JUNE 23, 2003

LOG-IN PAGE

Purpose

The Log-in Page is the entry point through which all authorized WebGrants users gain access to the WebGrants system. The minimum browser requirements for accessing WebGrants are Internet Explorer 6.0 or 5.5 and Netscape 7.0 or 6.2.3.

Page Elements

1. **Sign in Box**   To access the WebGrants system, enter your user name and password here.

2. **Help With Your Account**   Click here to view a pop-up window with information on:
   - How to sign in or create your account
   - Your account summary page
   - Passwords and password hints
   - Privacy and security

3. **CSAC Support**   Contact information for WebGrants technical support. Schools should contact the CSAC Help Desk for issues related to:
   - System Administrator User access ID or password
   - Web Site traffic issues or access
   - File transfer protocol and record layout questions
   - Help uploading GPA information
   - Initiating, changing or deleting access for System Administrators

Access

The Log-in Page will appear after entering the WebGrants web address into the address field on your browser toolbar. The web address for WebGrants is https://webgrants.csac.ca.gov.

NOTE: Remember that because this is a secure site, the address line begins with an "https" rather than "http."

Page Functions

Log in to the WebGrants system

To access the WebGrants system, a valid user name and password are required. User access to WebGrants is granted by the WebGrants System Administrator (Administrator) at each school. If you do not know who your Administrator is, or if you do not have an Administrator for your campus yet, contact the CSAC Help Desk for assistance.

Be aware that WebGrants usernames and passwords are case-sensitive. Your user name and password are also confidential and should not be shared.

1. Type your user name in the user name field of the sign in box.

2. Tab to the password field.

3. Type your password in the password field of the sign in box.

4. Click the <Sign-in> button

   ➜ If the user name and password entered are valid, the WebGrants Home Page will appear.

Contact the CSAC help desk via email

Click on the Email CSAC Support link

➜ The default email program on the PC through which you are accessing WebGrants will launch and a new mail item will be opened with the CSAC Help Desk email address filled in on the Recipient line.

Access the "Help With Your Account" help document

Click on the Help With Your Account link

➜ A new separate pop-up window will appear over the current WebGrants session. To close the help document window, click on the <X> button in the upper right corner of the pop-up window (see figure 2-1).

Figure 2-1: Close button

HOME PAGE

Purpose

The WebGrants Home Page is the central information portal for access to all areas within WebGrants. From here, you can navigate to all other pages that your user profile will allow you access to.

Page Elements

1. **WebGrants Navigation Bar** This navigation bar contains links to all other areas within WebGrants.   Only the areas within WebGrants that your user profile has been set-up to view will appear here.

2. **Options Box** The Options Box contains links to all other areas within WebGrants. Only the areas within WebGrants that your user profile has been set-up to view will appear.

3. **View Your Account Details** Click here to view your user profile information (including your page and school access lists) and to change your user password, email address, and phone number.

4. **Help With Your Account** Click here for information on:

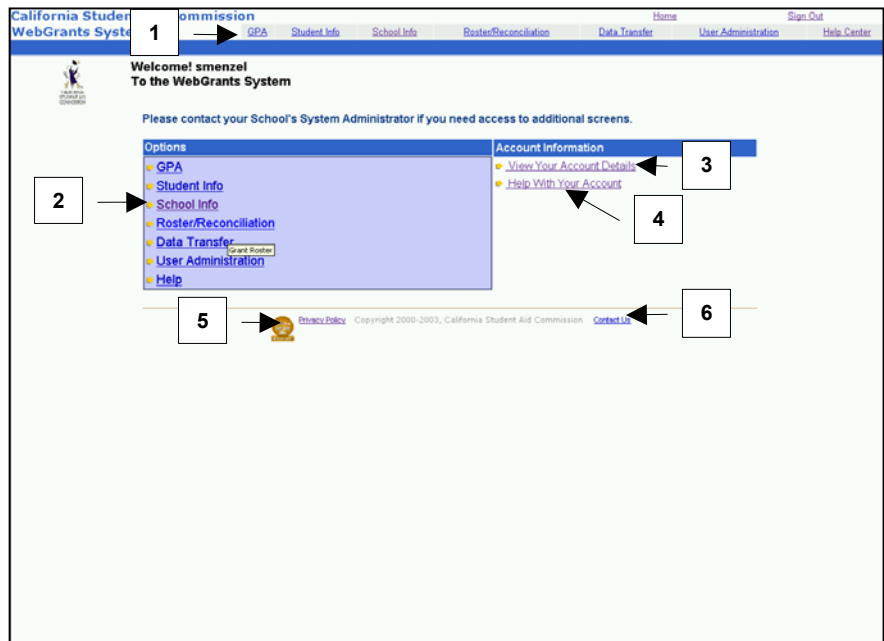   - How to sign in or create your account

   - Passwords and password hints

   - Privacy and security

   - Browser Requirements

   - Monitor Resolution

5. **Privacy Policy** Click here to view the Commission's policy on Information Privacy

6. **Contact Us** Click here to send an email to the CSAC Help Desk requesting technical assistance.

Access

The Home Page can be accessed by clicking the <Sign-in> button on the Login Page, or by clicking the Home link on the WebGrants navigation bar located in the upper right corner of every WebGrants page.

Time Out

There is a timeout feature that will occur after 20 minutes of inactivity. After 15 minutes of inactivity, a pop-up box will appear prompting you to click the <OK> button if you want to continue working in WebGrants.   If the "OK" box is not clicked within 5 minutes, you will automatically be signed out of WebGrants.

Page Functions

Navigate to all other areas within the WebGrants system

Within the WebGrants system, individual web pages are grouped together into areas, each with its own main page.   Links to these areas are located in the WebGrants Navigation Bar and in the Options Box. The links are labeled to reflect the functions performed in those areas.   Only the areas within WebGrants that your user profile has been set-up to view will appear.

Click on any link in the Navigation Bar or Options Box to navigate to the indicated area's main page.

View the current user's account information

Click on the <u>View Your Account Details</u> link
➜ The User Account Summary page will appear.

Access the WebGrants User Guide and other help documents

Click on the <u>Help</u> link located in the Options box or in the WebGrants Navigation Bar
➜ Links here will assist new WebGrants users in all areas of Cal Grant processing through WebGrants.

View the Commission's policy on privacy

Click on the <u>Privacy Policy</u> link
➜ A new separate pop-up window will appear over the current WebGrants session. To close the pop-up window, click on the <X> button in the upper right corner of the window (see figure 2-1).

Sign out of WebGrants

Click on the <u>Sign Out</u> link located in the WebGrants Navigation Bar
➜ The Sign Out Page will appear confirming that your session has been terminated.

NOTE: When finished working in WebGrants, remember to always sign-out to end your session. Simply leaving the site may permit other subsequent users at your workstation to re-enter the site using your previously established session, your user name, and your password.

User Account Summary Page

Purpose

When the WebGrants System Administrator creates a new user ID, a record of information about the new user is created called a *user profile*. Users can view a portion of the data stored in their user profile on this page. The only profile data that a user can modify themselves, however, is their sign-in password. All other modifications to a user's profile can only be made by the WebGrants System Administrator at the school.

Page Elements

1. **Back to Home Page** Link that returns the user to the WebGrants Home Page.

2. **Help With Your Account** Check here to view a pop-up window with information on:

   - How to sign in or create your account
   - Your account summary page
   - Passwords and password hints
   - Privacy and security

3. **Sign In Info** User ID and email address of the current user.

4. **Change Your Password** Click here to change the sign-in password for the current user. A pop-up window will be displayed to allow for password changed.

5. **Change Your Email** Click here to update your current email address.

6. **Sign-out** Click here to end the current WebGrants session.

7. **Screen Access List** For each of the WebGrants areas listed, indicates one of the following levels of access allowed the current user:

   - *None* The user does not have the navigation options available to access this area of WebGrants.
   - *Read* The user can navigate to the pages in this area and view information but cannot perform any update functions.
   - *Write* The user can navigate to the pages in this area, view information and perform update functions available on those pages.

8. **Contact Info** Demographic information for the current user.

9. **Change Your Phone Number** Click here to update your current work phone number.

10. **School Access List** All the schools/branch campuses to which the current user has WebGrants access. To add or delete schools or branch campuses to your list, contact your Administrator.

11. **School Administrators** Lists the WebGrants School administrator(s) who can modify your user profile.

Access

This page can be accessed by clicking on the <u>View Account Details</u> link on the Home Page (see page 4).

Page Functions

Change Your Password

Your user name and password are confidential and should not be shared.   Also, be aware that WebGrants usernames and passwords are case-sensitive.

1. Click the <u>Change Your Password</u> link
   ➔ The Password Dialogue Box will appear (see figure 6-1).
2. Type the new password in the first field in the password dialogue box
3. Retype the same new password in the second field of the password dialogue box
4. Click the <OK> button
   ➔ The message "Password successfully changed" will appear at the top of the password dialogue box.
5. To close the Password Dialogue Box, click on the <X> button in the upper right corner of the pop-up window (see figure 2-1).

Change Your Email Address or Phone Number

1. Type the new email address in the Change Your Email Address field or type the new phone number in the Change Your Phone Number field.
2. Click the corresponding <Submit> button
   ➔ The new email address and/or phone number will appear above the Change Your Email Address and/or the Change Your Phone Number fields.

Sign out of WebGrants

Click on the <u>Click Here to Sign Out</u> link located in the middle left side of the page **OR**

Click on the <u>Sign Out</u> link on the WebGrants Navigation Bar located in the upper right corner of every WebGrants page.

➔ The Sign Out Page will appear confirming that your session has been terminated (see page 37).

   NOTE: When you have finished working in WebGrants, remember to always sign-out to end your session. Simply leaving the site may permit other subsequent users at your workstation to re-enter the site using your previously established session, your user name and your password.
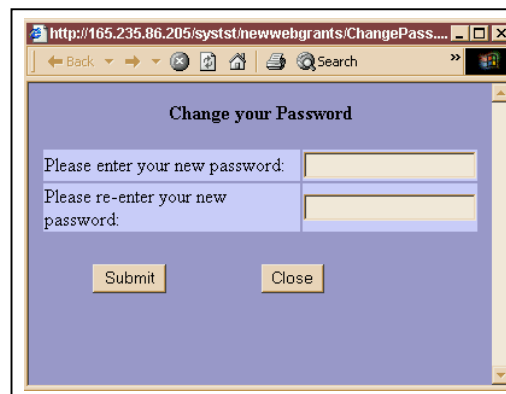

Figure 6-1: Password Dialogue Box